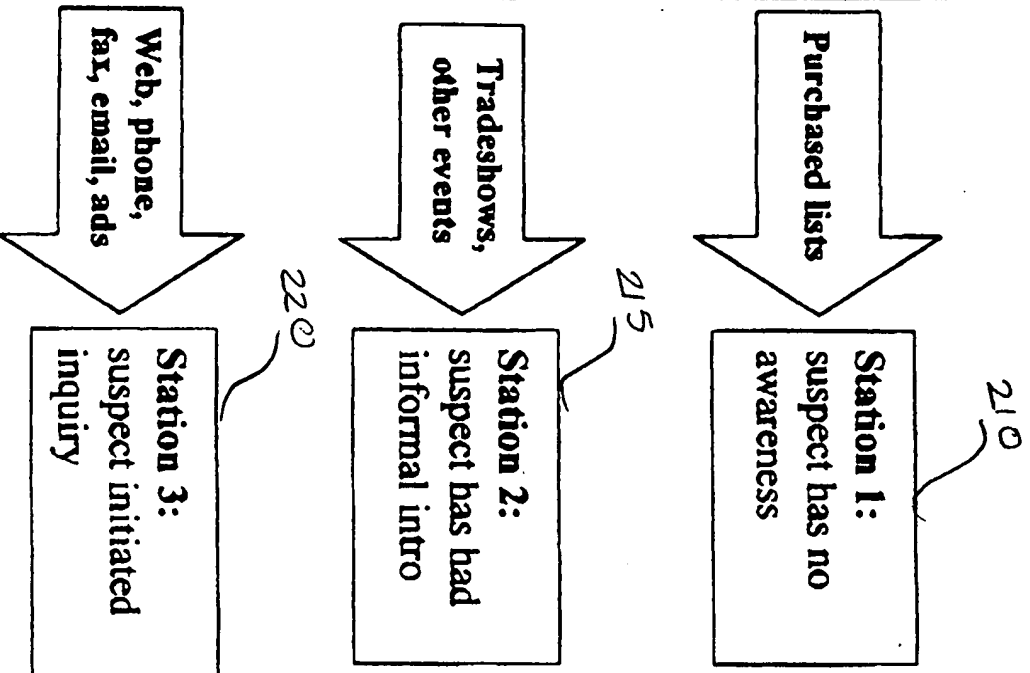
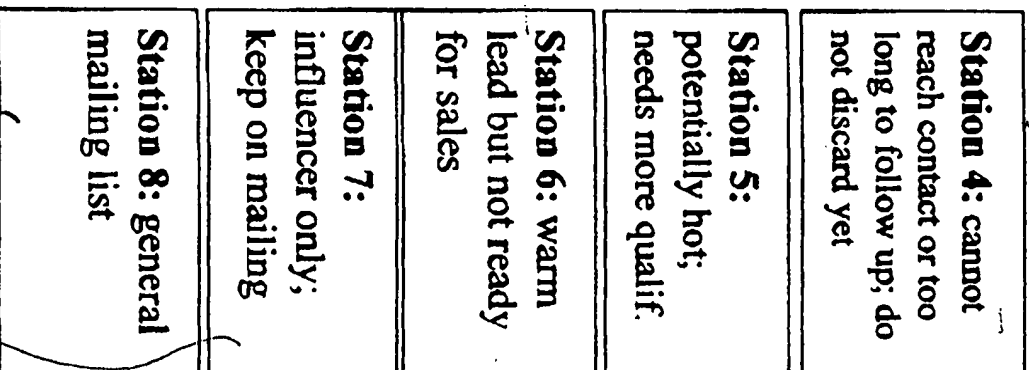


LEAD FACTORY  
FLOW DIAGRAM

Examine pipeline sources



Marketing Attribution



Sales Attribution

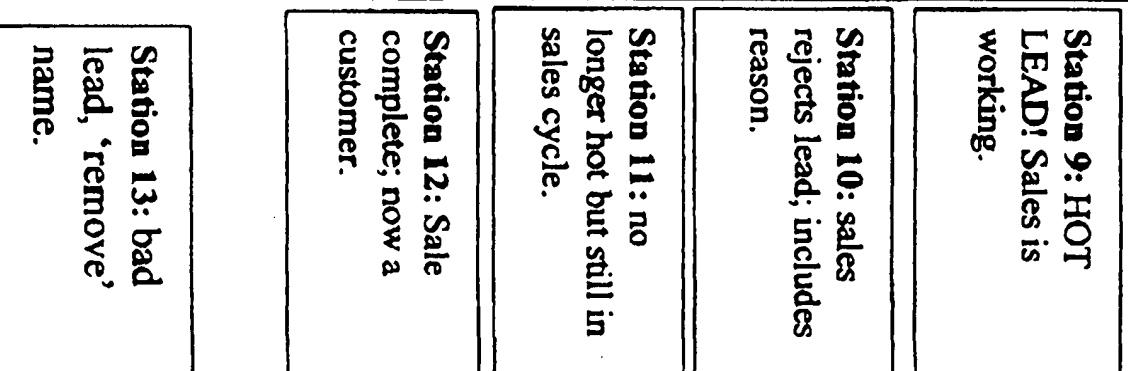


FIG. 1

### Change Company Info

22



## Add/Change Users

21



### Add/Change Sources

25



## Change Station Definitions

28

# Tutorial

Fig. 2

42      44      46  
  {      {      {

Add User    Edit User    Delete User

32

33

First Name:

☐ User

38

Last Name:

☐ Administrator

Email:

# Admin Users

User Name:

Password:

Company:

34

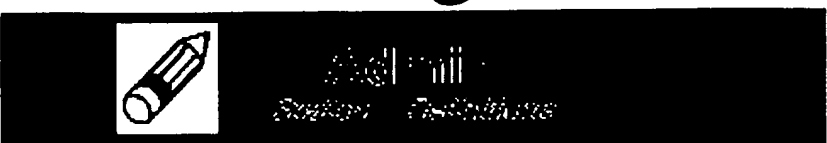


35

37

36

FIG. 3













- S1 : Unaware Lead : These are people who probably dont know anything about your company or product(I.e. from mailing lists). 
- S2 : Somewhat Aware : These are people who probably dont know anything about your company or product(I.e. from tradeshow). 
- S3 : Aware Lead : Inbound inquiry, Suspect have taken an action to get introduced to your company. 
- S4 : Unable to contact : Attempts are being made but no contact has resulted. 
- S5 : Unqualified : This person has been formally introduced to your company but remains unqualified at this time. 
- S6 : Warm Lead : Warm lead, not ready for sale yet. Requires further marketing qualification. 
- S7 : Influencer not primary contact : This is not the key contact but someone who may influence a sale. Keep on marketing to this person. 
- S8 : Mailing List : General mailing list
- S9 : Hot Lead : Hot Lead! Passed to sales for close. 
- S10 : Rejected Lead : Sales rejects lead; includes reason 
- S11 : In pipeline : Still in the sales pipeline but not considered hot. 
- S12 : Sale Complete : Sale complete! now a customer.
- S13 : Bad Lead : Bad lead

Fig. 4

# Admin

## Station 1 Definition



**S1 : Unaware Lead:**  
These are people who probably dont know anything about your company or product(l.e. from mailing lists).

Stationmaster:

Stationmaster may reassign to:

The duration a lead may remain in this station is:  days.

Once leads expire, send an email to:

Should leads remain in that station 1 week after

the first email is sent, send another email to:

If no response after one more week, move leads to station:

FIG. 5



New source name ~ 70 ~

Add a Source ~ C8

Description ~ 72 ~

Station ~ 74 ~

Source ~ 78 ~

Description ~ 80 ~

Station ~ 82 ~

Edit a Source

Select Source

Select Station

Select Station

Save

Save

84

FIG. 6

http://216.59.35.248:8080/examples/htlead/addOrEditSource.jsp

**add a name**

92

<b>Company</b>	<input type="text" value="None"/>		<b>Division</b>	<input type="text" value="Select Division"/>	
	<input type="button" value="Add New Company"/>			<input type="text" value="Add New Division"/>	
<b>Contact First Name*</b>	<input type="text"/>		<b>Contact Last Name*</b>	<input type="text"/>	
<b>Title</b>	<input type="text"/>		<b>Other Contacts</b>	<input type="text" value="Select Person"/>	
<b>Address</b>	<input type="text"/>				
<b>Street Name</b>	<input type="text"/>		<b>Office Phone</b>	<input type="text"/>	
<b>City</b>	<input type="text"/>		<b>Cell Phone</b>	<input type="text"/>	
<b>State/Province</b>	<input type="text"/>		<b>Other Phone</b>	<input type="text"/>	
<b>Zip/Postal Code</b>	<input type="text"/>		<b>Fax</b>	<input type="text"/>	
<b>Country</b>	<input type="text"/>		<b>Email</b>	<input type="text"/>	
<b>Comment</b>	<input type="text"/>				

96

<b>Source*</b>	<input type="text" value="Select Source"/>		<b>Add New Source</b>	<input type="text"/>	
<b>Station Primary*</b>	<input type="text"/>		<b>Assigned to</b>	<input type="text"/>	

Fig. 7



1. Create a new map

New Map

108

2. Assign

Station: SI : Unaware Lead



Source: Chicago Tribune



3. Select an existing map

102

96



Select an existing Map

104

Next

106

FIG. 8



## Import List



1. Select a file to import:

112

Browse...

114

Submit File

118

FIG. 9



Select a  
Report:

By Chicago Tribune  
Source: Boston Herald  
USA Today

310

314

Run Report

325

By S1 : Unaware Lead  
Station: S2 : Somewhat Aware  
S3 : Aware Lead

Run Report

325

Aging By Chicago Tribune  
By Boston Herald  
Source: USA Today

316

318

Run Report

325

Aging by S1 : Unaware Lead  
by S2 : Somewhat Aware  
Station: S3 : Aware Lead

Run Report

325

Aging  
by  
Lead:

Run Report

320

FIG. 11

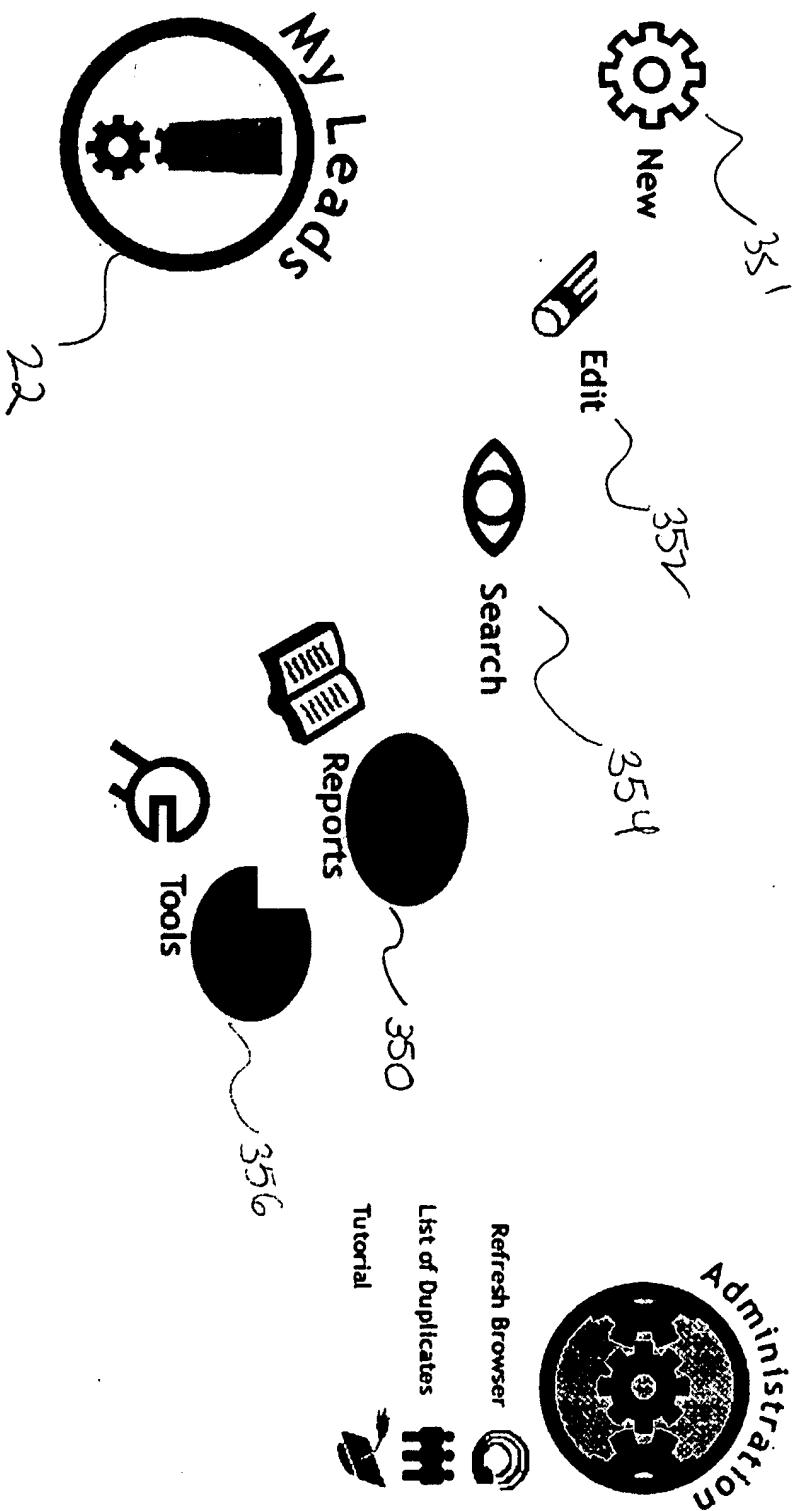



Fig 12

# AutoGen Reporting




Review existing autogen

Select Report 

360

Previous Users Select to Delete

Select User To Delete 

364

Create New Report

376

368

DateRange: Select One

☐ Last 24 hours

☐ 1 Week prior

☐ 1 Month Prior

☐ 3 Months prior

☐ 6 Months prior

☐ 1 Year prior

☐ Since system inception

Frequency of update:

372

☐ Once a day

☐ Once a week

☐ Once a month

☐ Once a quarter

Fig. 13

Fig. 14

## My Leads

Name	Title	Company	Address	Phone	Email	Station	Sou
John Cussack		None	N/A ; N/A N/A N/A N/A			S2 : Somewhat Aware	Chic: Tribi
Tarun Sharma		Sedona	N/A ; N/A Alabama N/A N/A			S2 : Somewhat Aware	Chic: Tribi
Sam0 Shepherd0	Dr	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
Sam1 Shepherd1	Dr	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
crazy0 devo0	web	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
crazy1 devo1	web	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
achmed0 boolad0	runnermansingliker	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
achmed1 boolad1	runnermansingliker	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
ed0 lane0	wazzupguy	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
ed1 lane1	wazzupguy	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
cool0 kid0	coolman	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
cool1 kid1	coolman	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
bob00 woodizergizerman0	nothing	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi
bob01 woodizergizerman1	nothing	None	1 ; 1 1 1 N/A	11 11		S4 : Unable to contact	Chic: Tribi
mystery0 man0	hmmmm	None	0 ; 0 0 0 N/A	00 00		S4 : Unable to contact	Chic: Tribi

# Act On A Lead

Company	Coke	Division	Select Division
408 Edit Company		412 Edit Division	
Contact First Name*	Adam0	Contact Last Name*	Greisman0
414 Title	CTO	Other Contacts	Adam0 Greisman0
Address		Office Phone	0
Street Name	2310	Cell Phone	0
City	NYC0	Other Phone	0
State/Province	NY0	Fax	0
Zip/Postal Code	018030	Country	USA
Email	info@coke.com		



Comment

418

Source\*

USA Today

Station Primary\*

S2 : Somewhat Aware

Assigned to

admin

422

Clear

Submit

Print

422C

FIG. 15

# view/edit a name



Company	<input type="text" value="None"/>	<input checked="" type="checkbox"/> Division	<input type="text" value="Select Division"/>
	<input type="text" value="430"/>	<input type="text" value="Edit Company"/>	<input type="text" value="Edit Division"/>
Contact First Name*	<input type="text"/>	Contact Last Name*	<input type="text" value="432"/>
Title	<input type="text"/>	Other Contacts	<input type="text" value="Select Person"/>
Address	<input type="text"/>		
Street Name	<input type="text"/>	Office Phone	<input type="text"/>
City	<input type="text"/>	Cell Phone	<input type="text"/>
State/Province	<input type="text"/>	Other Phone	<input type="text"/>
Zip/Postal Code	<input type="text"/>	Fax	<input type="text"/>
Country	<input type="text"/>	Email	<input type="text"/>
Comment	<input type="text" value="438"/>		
Source*	<input type="text" value="440"/>		
Station Primary*	<input type="text"/>		
Assigned to	<input type="text"/>		

445

450

FIG. 16





# view/edit a company

Company name*	Coke	460
Street address	Nevada St	462
City	Nevada	464
State/Province	New Jersey	466
ZIP/Postal code	18972	468
Country	USA	
Email	carun@coke.com	
Url	www.coke.com	
Phone	476 898	
Comments	Coke is Coke.....!!	



478

482

484

Fig. 17